

**Grantee Report for the Period: October 1, 2004 through September 30, 2005  
Equal Access Fund**

**SUPPORT CENTER PROJECTS**

**Instructions**

Please complete a report package for **the period October 1, 2004 through September 30, 2005**. Please feel free to contact the Legal Services Trust Fund staff to discuss any questions you have while you are in the process of completing the report package.

The forms are due by e-mail by **5:00 p.m., Monday, December 5, 2005** to [trustfundprogram@calbar.ca.gov](mailto:trustfundprogram@calbar.ca.gov). No hard copy is required if you submit the forms by e-mail. You may submit the forms in hard copy if necessary.

The forms, once completed, will provide a clear description of how your organization spent the grant funds, as well as a report on the results of the grant. Trust Fund Commission members will use your report, along with the summary project description that was part of your EAF budget submission, to describe your project's goals and results to the legislature, the private bar, the judiciary and the general public.

There are **four** forms to complete for each project. Two of them are "packaged" in an MSWord file, called the "Narrative" package:

***Narrative Package***

**Form A:** Report on Project Results

**Form B:** Examples Illustrating Major Results Achieved

The other two forms are provided in an MSeExcel Spreadsheet, called the "Data" package:

***Data Package***

**Form C:** Financial and Staffing Report

**Form D:** Assistance Summary Report

**MANDATORY FORMS -- DOCUMENTS REQUIRED FOR SUBMISSION**

Complete and submit by e-mail an **entire set (Narrative and Data) for each EAF project** funded by your organization's Equal Access Fund Grant (for example, if you have 3 projects, you should submit 6 documents). Also included in these instructions is an Outline for program-owned evaluations (which are in addition to the Mandatory Forms).

**Form A: Report on Project Results.**

If you completed a "program-owned" evaluation of the project, attach a report of the evaluation.

**Form B: Examples Illustrating Results.**

Provide descriptions of **two** specific examples of the project's services. **The examples can fall under any of the three questions and should total only two for each project.**

## Form C: Project Staffing, Expenditures and Revenue.

You may use estimates for the amounts of non-EAF funds used for the project. Use the following definitions to categorize the data for this report:

### Personnel

- Lawyers:** Salaries and wages paid to attorney employees, whether full-time, part-time or temporary. On **Form C**, state the number of full-time equivalents positions.
- Paralegals:** Salaries and wages paid to paralegal employees (including law graduates, legal assistants and law students), whether full-time, part-time or temporary. Paralegals are persons working under the supervision and control of an attorney, whose duties consist primarily of such activities as intake interviewing, case investigations, checking court records, legal research, client representation at administrative hearings and outreach and community work. On **Form C**, state the number of full-time equivalents positions.
- Other Staff:** Salaries and wages paid to all other staff, whether administrative/clerical or others, and whether full-time, part-time or temporary. On **Form C**, state the number of full-time equivalents positions.
- Employee Benefits:** Fringe benefits and payroll taxes paid on behalf of employees, such as retirement, FICA, health and life insurance, workers' compensation, unemployment insurance, and other payroll-related costs.

### Non-Personnel

- Contract Services to Clients:** Payments to private attorneys, consultants or organizations who provide professional services to clients specifically with regard to the project(s) funded by the Equal Access Fund Grant.
- Other:** All expenses specifically with regard to the project(s) funded by the Equal Access Fund grant, and not included in contract services to clients.

## Form D: Assistance Summary Report

This form requests information regarding programs served by your program during the reporting period.

For purposes of this form, "Qualified Legal Services Programs" are organizations that have, as their principal purpose and function, the provision of direct legal services, and that receive funding from the Legal Services Trust Fund Program. Do not include services to other Support Centers on this form, even if they receive Trust Fund grants.

### 1. Training

Provide separate data on the number of trainings in which you participated as a trainer/facilitator and those in which you participated as a panelist, including the number of attendees from Legal Services Projects, and the number of other attendees.

### 2. Technical Assistance

Indicate the number of individual requests for service and the number of matters in which services were actually provided. Organize this data by incidences of providing Brief Service, Research, and Extensive or In-Depth Consultation.

### 3. Advocacy Support

Indicate the number of requests for assistance made to your Center, the number of cases or matters actually undertaken at the request of, and in conjunction with, Qualified Legal Services Programs, and the number of cases or matters actually undertaken at the request of other organizations.

Organize these data under the following categories:

- Consultation
- Representation in adversarial legal matters
- Non-adversarial legal services provided at the request of an organization that remained involved in the matter
- Administrative or legislative advocacy provided at the request of another organization
- Other advocacy services.

## **PROGRAM-OWNED EVALUATION REPORT OUTLINE**

Ideally reports of program-owned evaluations should be concise, totaling no more than five pages for a project, unless you are already preparing a more extensive report for some other purpose. Please be sure to include your program's name on the report and follow this general outline as a guide.

- I. **Introduction.** Name of project; brief description of project (no more than a few sentences); issue or issues the project is trying to address or the problem that needs to be solved; method of addressing the issue or type of service provided to remedy the problem; and results sought.
- II. **Evaluation Questions and Measures.** List the evaluation questions and the measures used to answer those questions. The answers (based on the data you collect) should inform the reader about whether and how you are accomplishing the goals described in the introduction.
- III. **Methods**
  - A. **Description of *study population*.** Briefly describe whom you are studying and why they are an appropriate group. If you are collecting data on a *sample* of the study population, describe how the sample was chosen and why it is representative of the population.
  - B. **Description of how data was collected.** Briefly describe who collected the data (e.g., staff, student interns, volunteers), the time period of collection, how the data was recorded and stored.
  - C. **Description of instruments used.** Briefly describe the instruments used, and why you chose them as the best method for getting the data you wanted. Attach copies of any surveys, interview questions, focus group topics, etc.
- IV. **The Data Itself.** Provide the raw data, the numerical, and/or statistical information that were used for the data analysis and findings, Part V. Be sure to include the response to your data collection, such as the number of surveys distributed and received, the number of interviews conducted, the responses, the amount of missing data and the like.
- V. **Data analysis and findings.** Describe how you analyzed the data, such as reading through transcripts or notes looking for common themes, coding interviews or calculating frequencies and other statistics from data bases. Present any charts or graphs summarizing the data. Clearly state the most important findings.
- VI. **Conclusion.** Explain what the findings mean to you and why they are important. Make any recommendations for future actions and frame the next questions to be investigated.